



HUD Moving to Work Expansion Training

HUD-50058 MTW Expansion Form Changes
May 25, 2022

Today's Agenda

HUD-50058 MTW Expansion Form Changes

1

HUD-50058 MTW Expansion Family Report

2

What's Different for MTW Expansion Agencies –
Sections 1-17

3

Questions



HUD-50058 MTW Expansion Family Report

- MTW Expansion agencies use the HUD-50058 MTW Expansion Family Report to collect and submit data about MOST families
- DO use this form if MTW flexibilities are applied to:
 - Regular Tenant-Based and Project-Based Vouchers (MTW Vouchers)
 - Public Housing
 - HUD-VASH Vouchers
 - EHV Vouchers
 - FUP Vouchers
 - FYI Vouchers
 - NED Voucher
 - Mainstream Vouchers
 - Mobility Demonstration Vouchers
 - TPVs
- Use the standard HUD-50058 (non-MTW Expansion) form:
 - When reporting on Mod Rehab
 - For households using the VASH or EHV programs if the PHA has not received approval to apply MTW flexibilities to those programs.
 - For any special purpose voucher if MTW flexibilities are not being applied

See the [MTW and Special Purpose Vouchers FAQs](#) for more information



HUD-50058 MTW Expansion Family Report

- Form differs in some ways from the standard HUD-50058 Family Report.
 - Data fields have been added to reflect MTW participation
 - Obsolete information removed
- Data will be submitted within your agency's reporting software
 - Appearance may differ depending on your agency's software

[HUD-50058: What's Different for MTW Expansion Agencies Resource](#)



Section 1: Agency

1. Agency

1a. Agency name

1b. PHA code

1c. Program P = Public Housing, T = Tenant-Based Assistance, PR = Project-Based Assistance
 H = Homeownership, LP = Local, Non-Traditional Property-Based Vouchers, LN = Local,
 Non-Traditional Tenant-Based

1d. Project Number (Public Housing only)

1e. Building Number (Public Housing only)

1f. Building Entrance Number (Public Housing only)

1g. Unit Number (Public Housing only)

1h. Unit Real Estate ID Number (see page ii)



Section 1: Lines 1c & 1h

1. Agency

1a. Agency name

1b. PHA code

1c. Program P = Public Housing, T = Tenant-Based Assistance, PR = Project-Based Assistance
H = Homeownership, LP = Local, Non-Traditional Property-Based Vouchers, LN = Local,
Non-Traditional Tenant-Based

1d. Project Number (Public Housing only)

1e. Building Number (Public Housing only)

1f. Building Entrance Number (Public Housing only)

1g. Unit Number (Public Housing only)

1h. Unit Real Estate ID Number (see page ii)



1c. Added program types LP/LN, which are unique to MTW Expansion PHAs

1h. Report what unit a household occupies using a unique ID # established by the system



Section 2: Action

2. Action	
2a. Type of Action	
2b. Effective date (mm/dd/yyyy) of action	
2c. Correction? (Y or N)	
2d. If correction: (check primary reason)	<input type="checkbox"/> Family correction of income <input type="checkbox"/> Family correction (non-income) <input type="checkbox"/> PHA correction of family income <input type="checkbox"/> PHA correction (non-income)
2h. Date (mm/dd/yyyy) of admission to program	
2i. Projected effective date (mm/dd/yyyy) of next reexamination	
2j. Projected date (mm/dd/yyyy) of next flat rent annual update (Public Housing flat rent only)	
2k. FSS participation now or in the last year? (Y or N)	
2m. Special program: (vouchers only) (check only one)	<input type="checkbox"/> Enhanced Voucher
2n. Other special programs: Number 01	
2n. Other special programs: Number 02	
2q. PHA use only	
2r. PHA use only	
2s. PHA use only	
2t. PHA use only	
2u. PHA use only	
2v. MTW self-sufficiency program participation now or in last year? (Y or N)	
2w. End of Participation reasons (only if 2a = End Participation)	
2x. Interim Reexamination reasons (only if 2a = Interim Reexamination)	

2a. #14 –
Historical
Adjustment
option removed.



Section 2: Line 2m

2. Action	
2a. Type of Action	
2b. Effective date (mm/dd/yyyy) of action	
2c. Correction? (Y or N)	
2d. If correction: (check primary reason)	<input type="checkbox"/> Family correction of income <input type="checkbox"/> Family correction (non-income) <input type="checkbox"/> PHA correction of family income <input type="checkbox"/> PHA correction (non-income)
2h. Date (mm/dd/yyyy) of admission to program	
2i. Projected effective date (mm/dd/yyyy) of next reexamination	
2j. Projected date (mm/dd/yyyy) of next flat rent annual update (Public Housing flat rent only)	
2k. FSS participation now or in the last year? (Y or N)	
2m. Special program: (vouchers only) (check only one)	<input type="checkbox"/> Enhanced Voucher
2n. Other special programs: Number 01	
2n. Other special programs: Number 02	
2q. PHA use only	
2r. PHA use only	
2s. PHA use only	
2t. PHA use only	
2u. PHA use only	
2v. MTW self-sufficiency program participation now or in last year? (Y or N)	
2w. End of Participation reasons (only if 2a = End Participation)	
2x. Interim Reexamination reasons (only if 2a = Interim Reexamination)	

2m. Welfare to Work
not listed – no longer an active program. Check “Enhanced Voucher” if applicable. Otherwise leave blank.



Section 2: Line 2v

2:	Action
Line 2a:	Use the codes provided at the bottom of the page to report the family's type of action.
Note:	When a family that receives flat rent requires a full reexamination, use Annual Reexamination (2a= 2).
Line 2b:	Date the reported action becomes effective.
Note:	The effective date cannot be earlier than the date of admission to the program (line 2h).
Line 2c:	Allows PHAs to correct fields previously transmitted in error.
Note:	Use a correction for a minor change to a previously submitted record.
Line 2d:	Indicate the primary reason for the correction record.
Line 2h:	Date the PHA initially admitted the family into the program reported in line 1c.
Line 2i:	The projected effective date of the family's next reexamination.
Line 2j:	Public Housing flat rent only. Projected effective date of the next flat rent annual update.
Line 2k:	Indicate if the family currently participates or participated in the Family Self-Sufficiency program in the past year.
Line 2m:	Housing Choice Vouchers only. Indicate if the family receives an Enhanced Voucher.
Line 2n:	Indicate if the family participates in a special program.
Note:	See Form HUD-50058 Instruction Booklet for a listing of special programs and their abbreviations.
Line 2q-2u:	PHAs may use these lines for any information they wish to collect.
Line 2v:	Indicate if the family currently participates or participated in an MTW self-sufficiency program in the past year.
Note:	HUD encourages PHAs to use lines 2q through 2u for local initiatives.
Line 2w:	If line 2a is End Participation, indicate the reason the family ended their participation in the program
Line 2x:	If line 2a is Interim Reexamination, indicate the reason there has been a change to the family's information at a time other than a full reexamination or change of unit.

New

2v. Line 2v allows you to indicate whether the household was an MTW Self-Sufficiency participant in the last year.



Section 2: Lines 2w & 2x

2:	Action
Line 2a:	Use the codes provided at the bottom of the page to report the family's type of action.
Note:	When a family that receives flat rent requires a full reexamination, use Annual Reexamination (2a= 2).
Line 2b:	Date the reported action becomes effective.
Note:	The effective date cannot be earlier than the date of admission to the program (line 2h).
Line 2c:	Allows PHAs to correct fields previously transmitted in error.
Note:	Use a correction for a minor change to a previously submitted record.
Line 2d:	Indicate the primary reason for the correction record.
Line 2h:	Date the PHA initially admitted the family into the program reported in line 1c.
Line 2i:	The projected effective date of the family's next reexamination.
Line 2j:	Public Housing flat rent only. Projected effective date of the next flat rent annual update.
Line 2k:	Indicate if the family currently participates or participated in the Family Self-Sufficiency program in the past year.
Line 2m:	Housing Choice Vouchers only. Indicate if the family receives an Enhanced Voucher.
Line 2n:	Indicate if the family participates in a special program.
Note:	See Form HUD-50058 Instruction Booklet for a listing of special programs and their abbreviations.
Line 2q-2u:	PHAs may use these lines for any information they wish to collect.
Line 2v:	Indicate if the family currently participates or participated in an MTW self-sufficiency program in the past year.
Note:	HUD encourages PHAs to use lines 2q through 2u for local initiatives.
Line 2w:	If line 2a is End Participation, indicate the reason the family ended their participation in the program
Line 2x:	If line 2a is Interim Reexamination, indicate the reason there has been a change to the family's information at a time other than a full reexamination or change of unit.



2w. Leave blank unless you selected End of Participation in line 2a. If household is ending participation, choose one of the 13 options above.

2x. Leave blank unless you selected Interim Reexamination in line 2a.



Questions?

- 1c. Added program types LP/LN, which are unique to MTW Expansion PHAs
- 1h. Adds new line that captures Unit Rental Estate ID Number
- 2a. Historical adjustment option removed
- 2v. MTW self-sufficiency program participation now or in last year?
- 2w. End of Participation reasons (only if 2a = End Participation)
- 2x. Interim Reexamination reasons (only if 2a = Interim Reexamination)



Section 3: Household

3. Household							
3a. Head of Household Member number 01	3b. Last name & Sr., Jr. etc.			3c. First name	3d. MI	3e. Date of birth	3f. Age on effective date of action
	3g. Sex	3h. Relation H	3i. Citizenship	3j. Disability (Y or N)	3k. Race [] 1. [] 2. [] 3. [] 4. [] 5.		3m. Ethnicity
	3n. Social Security Number			3p. Alien Registration Number A-		3q. Meeting community service or self-sufficiency requirement? (PH only)	
	3r. Average number of hours worked per week						
3s. Work requirement compliance							
3t. Total number in household							
3u. Family subsidy status under Noncitizens Rule							
3v. Eligibility effective date (mm/dd/yyyy) if qualified for continuation of full assistance (3u=C)							
3w. If new head of household, former head of household's SSN							

3r & 3s



Section 3: Line 3r

3. Household

3a. Head of Household Member number 01	3b. Last name & Sr., Jr. etc.		3c. First name	3d. MI	3e. Date of birth	3f. Age on effective date of action
	3g. Sex	3h. Relation H	3i. Citizenship	3j. Disability (Y or N)	3k. Race [] 1. [] 2. [] 3. [] 4. [] 5.	3m. Ethnicity
	3n. Social Security Number		3p. Alien Registration Number A-		3q. Meeting community service or self-sufficiency requirement? (PH only)	
	3r. Average number of hours worked per week					
3a. Member number 02	3b. Last name & Sr., Jr. etc.		3c. First name	3d. MI	3e. Date of birth	3f. Age on effective date of action
	3g. Sex	3h. Relation	3i. Citizenship	3j. Disability (Y or N)	3k. Race [] 1. [] 2. [] 3. [] 4. [] 5.	3m. Ethnicity
	3n. Social Security Number		3p. Alien Registration Number A-		3q. Meeting community service or self-sufficiency requirement? (PH only)	
	3r. Average number of hours worked per week					

New

3r. Report for each household member, including those exempt from any work requirement. Earned income from minors only collected for individuals 15 years of age or older. If a household member is less than 15 years old, leave blank.

Work for pay includes any kind of work. If household member did not work the same number of hours each week over the past year, select the response that represents member's average number of hours per week worked over past year.



Section 3: Line 3s

New

3s. Work requirement compliance

3t. Total number in household

3u. Family subsidy status under Noncitizens Rule

3v. Eligibility effective date (mm/dd/yyyy) if qualified for continuation of full assistance (3u=C)

3w. If new head of household, former head of household's SSN

3s. Work requirement compliance codes:

1 = In compliance

2 = Exempt

3 = Receiving a hardship

4 = Not in compliance, in probationary period and not subject to penalties

5 = Not in compliance, subject to penalties

6 = Not applicable, no work requirement policy

3s. Collects information about work requirement compliance at household



Sections 4 – Line 4f

4. Background at Admission

4a. Date (mm/dd/yyyy) entered waiting list

4b. ZIP code before admission

4c. Homeless at admission? (Y or N)

4d. Does family qualify for admission over the very low-income limit? (HCV only) (Y or N)

4e. Continuously assisted under the 1937 Housing Act? (Y or N)

4f. “Is there a HUD approved income targeting disregard?” removed.



Section 5: Line 5i

5. Unit to be Occupied on Effective Date of Action			
5a. Unit Address			
Number and street			Apt.
City	State	ZIP code (+4)	
5b. Is mailing address same as unit address? (Y or N) (if yes, skip to 5d)			
5c. Family's mailing address			
Number and street			Apt.
City	State	ZIP code (+4)	
5d. Number of bedrooms in unit			
5e. Has the PHA identified this unit as an accessible unit? (Public Housing only) (Y or N)			
5f. Has the family requested accessibility features? (Public Housing only) (Y or N) (if no, skip to next section)			
5g. Has the family received requested accessibility features? (Public Housing only)			
[] a. Yes, fully [] b. Yes, partially [] c. No, not at all [] d. Action pending (can be checked in combination with b. or c.)			
5h. Date (mm/dd/yyyy) unit last passed HQS inspection (Section 8 only, except Homeownership and Project-based Vouchers)			
5i. Date (mm/dd/yyyy) of last HQS inspection (Section 8 only, except Homeownership and Project based Vouchers)			
5j. Year (yyyy) unit was built (Section 8 only)			
5k. Structure type (check only one) (Section 8 only)			
[] Single family detached		[] Semi-detached	
[] Low-rise		[] High rise with elevator	
		[] Rowhouse/townhouse	
		[] Manufactured home	

5i. "Annual" removed in line description since inspections may be done at intervals other than annually.



Questions?

3r. Number of hours worked

3s. Work requirements (if applicable)

4f. HUD approved income targeting disregard removed

5i. “Annual” removed from HQS Inspection line



Section 6: Assets

Read instructions
on next page first!

**Section 6:
No Changes!**

Head of household name	Social Security Number	Date modified (mm/dd/yyyy)
------------------------	------------------------	----------------------------

6. Assets

6a. Family Member Name	No.	6b. Type of asset	6c. Calculation (PHA use)	6d. Cash value of asset	6e. Anticipated Income
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
6f, 6g. Column totals				\$ 6f.	\$ 6g.
6h. Passbook rate (written as decimal)					6h.
6i. Imputed asset income: 6f X 6h (if 6f is \$5,000 or less, put 0)					6i.
6j. Final asset income: larger of 6g or 6i					6j.

Section 7: Line 7h

7. Income						
7a. Family Member Name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions (7d minus 7e)
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
7g. Column total						\$ 7g.
7h. Prior year or current year/anticipated income				<input type="checkbox"/> Prior year <input type="checkbox"/> Current year/anticipated income		
7i. Total annual income: 6j + 7g						7i.

7h. Previously “Reserved,” now used to collect “Prior year or current year/ anticipated income.”

Section 8: Deductions and Allowances

8. Deductions and Allowances

8a. Total annual income: copy from 7i

\$

Permissible Deductions (Public Housing Only. If Section 8, Skip to 8f or 8g)

8b. Family Member Name

No.

8c. Type of permissible deduction

8d. Amount

\$

\$

\$

\$

\$

\$

\$

8e. Total permissible deductions (sum of column 8d)

\$

If head/spouse/co-head is under 62 and no family member is disabled, skip to 8g

8f. Medical/disability threshold: 8a X 0.03

\$

8g. Total annual unreimbursed disability assistance expense (if no disability expenses, skip to 8k)

\$

8h. Maximum disability allowance: If 8g minus 8f is positive or zero, put amount

\$

Section 8 label changed from "Expected Income Per Year" to "Deductions and Allowances" to more accurately reflect information collected.

Section 8: Line 8u

8h. Maximum disability allowance: If 8g minus 8f is positive or zero, put amount	
	If negative and head/spouse/co-head is under 62 and not disabled, put 0
	If negative and head/spouse/co-head is elderly or disabled, copy from 8g
8i. Earnings in 7d made possible by disability assistance expense	
8j. Allowable disability assistance expense: lower of 8h or 8i (if 8g is less than 8f and head/spouse/co-head is elderly or disabled, copy from 8h)	
8k. Total annual unreimbursed medical expenses (if head/spouse/co-head under 62 and not disabled, copy from 8g)	
8m. Total annual disability assistance and medical expense: 8j + 8k (if no disability expenses, copy from 8g)	
8n. Medical/disability assistance allowance:	If no disability assistance expenses or if 8g is less than 8m minus 8f (if 8m minus 8f is negative, put zero)
	If disability assistance expenses and 8g is greater than 8m minus 8f, copy from 8m
8p. Elderly/disability allowance (default = \$400)	
8q. Number of dependents (people under 18, or with disability, or full-time student. Do not count head, spouse, co-head, foster child/adult, or live-in aide.)	
8r. Allowance per dependent (default = \$480)	
8s. Dependent allowance: 8q X 8r	
8t. Total annual unreimbursed childcare costs	
8u. Deductions and allowances not reflected above (all programs: see page vi for more information)	
8x. Total allowances: 8e + 8n + 8p + 8s + 8t + 8u (all programs)	
8y. Adjusted annual income: 8a minus 8x (if 8x is larger, put 0)	

8u. Added to allow agencies utilizing MTW waivers to report total amount of deductions and allowances not included in one of the other lines in this section.

New

Section 9: Total Tenant Payment (TTP)

Head of household name	Social Security Number	Date modified (mm/dd/yyyy)
------------------------	------------------------	----------------------------

9. Total Tenant Payment (TTP)

9a. Total monthly income: $8a \div 12$	\$	9a.
9c. TTP if based on annual income: $9a \times 0.10$	\$	9c.
9d. Adjusted monthly income: $8y \div 12$	\$	9d.
9e. Percentage of adjusted monthly income: use 30% for vouchers	\$	9e.
9f. TTP if based on adjusted annual income: $(9d \times 9e) \div 100$	\$	9f.
9g. Welfare rent per month (if none, put 0)	\$	9g.
9h. Minimum rent (if waived, put 0)	\$	9h.
9i. Enhanced Voucher minimum rent	\$	9i.
9j. TTP, highest of lines 9c, 9f, 9g, 9h, or 9i	\$	9j.
9k. Most recent TTP	\$	9k.
9m. Qualify for minimum rent hardship exemption? (Y or N)	\$	9m.

Read instructions
on next page first!

Section 9:
No Changes!

Questions?

6. No changes

7h. Prior year or current year/anticipated income

8. Label changed from “Expected Income Per Year” to
“Deductions and Allowances

8u. Deductions and allowances not otherwise reflected

9. No changes



Section 10: Public Housing

10. Public Housing

10a. TTP: copy from 9j

10b. Unit's flat rent

Income Based Rent Calculation (if prorated rent, skip to 10h)

10d. Lower of TTP or flat rent (if no flat rent, put 10a)

10e. Utility allowance, if any

10f. Tenant rent: 10d minus 10e

If positive or 0, put tenant rent

If negative, credit tenant

“Turnkey III”
removed from the
label



Section 10: Lines 10c & 10d

10. Public Housing	
10a. TTP: copy from 9j	
10b. Unit's flat rent	
Income Based Rent Calculation (if prorated rent, skip to 10h)	
10d. Lower of TTP or flat rent (if no flat rent, put 10a)	
10e. Utility allowance, if any	
10f. Tenant rent: 10d minus 10e	If positive or rent If negative, (

10c, Income based ceiling rent, was removed

10d. Description changed to reference flat rent instead of ceiling rent.



Section 10: Lines 10u, 10v & 10w

Type of Rent			
10u. Type of rent selected:		<input type="checkbox"/> Income-based <input type="checkbox"/> Flat <input type="checkbox"/> Over-income rent <input type="checkbox"/> MTW Stepped rent <input type="checkbox"/> MTW Tiered rent <input type="checkbox"/> MTW alternative gross income <input type="checkbox"/> MTW alternative adjusted income <input type="checkbox"/> Other MTW alternative rent	
10v. Date over-income family exceeded the two-year grace period (if over-income rent was selected in 10u)			10v.
10w. Alternate tenant rent (if selection other than income-based or flat is marked in 10u)		If positive or 0, put tenant rent	\$ 10w.
		If negative, credit tenant	\$ 10w.

10u. Additional options added for type of rent

10v. Added to allow agencies to report date an over-income family exceeded two-year grace period outlined in HOTMA and explained in PIH Notice 2019-11. Only use if you selected over-income rent in line 10u; otherwise leave blank.

10w. Added so agencies can report amount of rent a household is paying if something other than income-based or flat is selected in line 10u.



10 Minute Break



Section 11: Project Based Vouchers and Local, Non-Traditional Property Based Vouchers

Section renamed
“Housing Choice
Voucher: Project-
Based Vouchers
and Local, Non-
Traditional
Property-Based”

11. Housing Choice Voucher: Project-Based Vouchers and Local, Non-Traditional Property-Based			
11b. Is family now moving to this unit? (Y or N)		\$	11b.
11d. Did family move into your PHA jurisdiction under portability? (Y or N) (if no, skip to 11g)			11d.
11e. Cost billed per month (put 0 if absorbed)		\$	11e.
11f. PHA code billed			11f.
11g. Housing type <input type="checkbox"/> Group Home (prorate gross rent) <input type="checkbox"/> SRO: 1 room occupied by 1 person			
11h. Owner name			11h.
11i. Owner TIN/SSN			11i.
11k. Contract rent to owner (if unit has other subsidy, put subsidized rent)		\$	11k.
11m. Utility allowance, if any		\$	11m.
11n. Gross rent of unit: 11k + 11m		\$	11n.
11q. TTP: copy from 9j		\$	11q.
Rent Calculation (if prorated rent, skip to 11aa)			
11r. Total HAP: 11n minus 11q. If 11q is larger, put 0		\$	11r.
11s. Tenant rent: 11k minus 11r		If positive or 0, put tenant rent	\$ 11s.
		If negative, credit tenant	\$ 11s.
11t. HAP to owner: lower of 11k or 11r		\$	11t.
11u. MTW specific alternate rent type: <input type="checkbox"/> MTW alternative gross income <input type="checkbox"/> MTW Stepped rent <input type="checkbox"/> MTW Tiered rent			
		<input type="checkbox"/> MTW alternative adjusted income <input type="checkbox"/> Other MTW alternative rent	
11v. Alternate HAP to owner (if a selection is made in 11u, including Local, Non-Traditional Property-Based program)		\$	11v.
11w. Alternate tenant rent (if a selection is made in 11u, including Local, Non-Traditional Property-Based program)		\$	11w.

Section 11: Lines 11v & 11w

11. Housing Choice Voucher: Project-Based Vouchers and Local, Non-Traditional Property-Based			
11b. Is family now moving to this unit? (Y or N)		\$	11b.
11d. Did family move into your PHA jurisdiction under portability? (Y or N) (if no, skip to 11g)			11d.
11e. Cost billed per month (put 0 if absorbed)		\$	11e.
11f. PHA code billed			11f.
11g. Housing type <input type="checkbox"/> Group Home (prorate gross rent) <input type="checkbox"/> SRO: 1 room occupied by 1 person			
11h. Owner name			11h.
11i. Owner TIN/SSN			11i.
11k. Contract rent to owner (if unit has other subsidy, put subsidized rent)		\$	11k.
11m. Utility allowance, if any		\$	11m.
11n. Gross rent of unit: 11k + 11m		\$	11n.
11q. TTP: copy from 9j		\$	11q.
Rent Calculation (if prorated rent, skip to 11aa)			
11r. Total HAP: 11n minus 11q. If 11q is larger, put 0		\$	11r.
11s. Tenant rent: 11k minus 11r		\$	11s.
		If positive or 0, put tenant rent	\$
		If negative, credit tenant	\$
11t. HAP to owner: lower of 11k or 11r		\$	11t.
11u. MTW specific alternate rent type: <input type="checkbox"/> MTW alternative gross income <input type="checkbox"/> MTW Stepped rent <input type="checkbox"/> MTW Tiered rent			
<input type="checkbox"/> MTW alternative adjusted income <input type="checkbox"/> Other MTW alternative rent			
11v. Alternate HAP to owner (if a selection is made in 11u, including Local, Non-Traditional Property-Based program)		\$	11v.
11w. Alternate tenant rent (if a selection is made in 11u, including Local, Non-Traditional Property-Based program)		\$	11w.

11u. Added so agencies can select one of five MTW alternate rent types, if applicable. Leave blank if standard rent calculation is being used.

11v & 11w. Added to capture total Housing Assistance Payment and amount of tenant rent to unit owner if agency is using an MTW alternate rent type or household is participating in the Local, Non-Traditional Property-Based program.



Section 11: Lines 11ap, 11aq & 11ar

Prorated Rent Calculation

11aa. Normal total HAP: 11n minus 11q		\$	11aa.
11ae. Total number eligible			11ae.
11af. Total number in family			11af.
11ag. Proration percentage: 11ae ÷ 11af			11ag.
11ah. Prorated total HAP: 11aa X 11ag		\$	11ah.
11ai. Mixed family TTP: 11n minus 11ah		\$	11ai.
11aj. Utility allowance: copy from 11m		\$	11aj.
11ak. Mixed family tenant rent: 11ai minus 11aj	If positive or 0, put tenant rent	\$	11ak.
	If negative, credit tenant	\$	11ak.
11an. Prorated HAP to owner: 11k minus 11ak (if 11ak is negative, put 11k)		\$	11an.
11ap. MTW specific alternate rent type:	<input type="checkbox"/> MTW alternative gross income <input type="checkbox"/> MTW Stepped rent <input type="checkbox"/> MTW Tiered rent <input type="checkbox"/> MTW alternative adjusted income <input type="checkbox"/> Other MTW alternative rent		
11aq. Alternate prorated HAP to owner (if a selection is made in 11ap, including Local, Non-Traditional Property-Based program)		\$	11aq.
11ar. Alternate prorated tenant rent (if a selection is made in 11ap, including Local, Non-Traditional Property-Based program)		\$	11ar.

11ap. Added so you can select one of five MTW alternate rent types if household's rent would be prorated, and they are not paying rent based upon standard prorated rent calculation.

New

11aq & 11ar. Added to capture total Housing Assistance Payment and prorated tenant rent to unit owner if agency is utilizing alternate rent type or household is participating in the Local, Non-Traditional Property-Based program.



Section 12: Housing Choice Vouchers: Tenant Based Vouchers

12. Housing Choice Voucher: Tenant-Based Vouchers or Local, Non-Traditional Tenant-Based

12a. Number of bedrooms on Voucher	\$	12a.
12b. Is family now moving to this unit? (Y or N)		12b.
12c. Does the family qualify as a Hard to House family? (Y or N)		12c.
12d. Did family move into your PHA jurisdiction under portability? (Y or N) (if no, skip to 12g)		12d.
12e. Cost billed per month (put 0 if absorbed)	\$	12e.
12f. PHA code billed		12f.
12g. Housing type <input type="checkbox"/> Group Home (prorate gross rent) <input type="checkbox"/> Own manufactured home, lease space <input type="checkbox"/> SRO: 1 room occupied by 1 person		
12h. Owner name		12h.
12i. Owner TIN/SSN		12i.
12j. Payment standard for the family	\$	12j.
12k. Rent to owner	\$	12k.
12m. Utility allowance, if any	\$	12m.
12p. Gross rent of unit: 12k + 12m (or Space Rent)	\$	12p.
12q. Lower of 12j or 12p	\$	12q.
12r. TTP: copy from 9j	\$	12r.
12s. Total HAP: 12q minus 12r	\$	12s.
Rent Calculation (if prorated rent, skip to 12ab)		
12t. Total family share: 12p minus 12s		
12u. HAP to owner: lower of 12k or 12s		
12v. Tenant rent to owner: 12k minus 12u		
12w. Utility reimbursement to family: 12s minus 12u, but do not exceed 12m		
12x. MTW specific alternate rent type: <input type="checkbox"/> MTW alternative gross income <input type="checkbox"/> MTW Stepped rent <input type="checkbox"/> MTW Tiered rent <input type="checkbox"/> MTW alternative adjusted income <input type="checkbox"/> Other MTW alternative rent		
12y. Alternate HAP to owner (if a selection is made in 12x, including Local, Non-Traditional Tenant-Based program)	\$	12y.
12z. Alternate tenant rent (if a selection is made in 12x, including Local, Non-Traditional Tenant-Based program)	\$	12z.

Reference to Local, Non-Traditional Tenant-Based Vouchers added to the label to reflect that this program type will use this section for rent calculation.



Section 12: Lines 12x, 12y & 12z /12ak, 12am & 12an

New

12x. MTW specific alternate rent type:	<input type="checkbox"/> MTW alternative gross income	<input type="checkbox"/> MTW Stepped rent	<input type="checkbox"/> MTW Tiered rent
	<input type="checkbox"/> MTW alternative adjusted income	<input type="checkbox"/> Other MTW alternative rent	
12y. Alternate HAP to owner (if a selection is made in 12x, including Local, Non-Traditional Tenant-Based program)	\$	12y.	
12z. Alternate tenant rent (if a selection is made in 12x, including Local, Non-Traditional Tenant-Based program)	\$	12z.	

Lines 12x, 12y, 12z, 12ak, 12am, and 12an were added.

New

Prorated Rent Calculation			
12ab. Normal total HAP: copy from 12s, but do not exceed 12p	\$	12ab.	
12ac. Total number eligible		12ac.	
12ad. Total number in family		12ad.	
12ae. Proration percentage: 12ac ÷ 12ad		12ae.	
12af. Prorated total HAP: 12ab X 12ae	\$	12af.	
12ag. Mixed family total family contribution: 12p minus 12af	\$	12ag.	
12ah. Utility allowance: copy from 12m	\$	12ah.	
12ai. Mixed family tenant rent to owner: 12ag minus 12ah	If positive or 0, put tenant rent	\$	12ai.
	If negative, credit tenant	\$	12ai.
12ai. Prorated HAP to owner: 12k minus 12ai. If 12ai is negative, put 12k	\$	12ai.	
12ak. MTW specific alternate rent type:	<input type="checkbox"/> MTW alternative gross income	<input type="checkbox"/> MTW Stepped rent	<input type="checkbox"/> MTW Tiered rent
	<input type="checkbox"/> MTW alternative adjusted income	<input type="checkbox"/> Other MTW alternative rent	
12am. Alternate prorated HAP to owner (if a selection is made in 12ak or for the Local, Non-Traditional Property-Based program)	\$	12am.	
12an. Alternate prorated tenant rent (if a selection is made in 12ak, including Local, Non-Traditional Property-Based program)	\$	12an.	
Additional Payments (not HAP)			
12ap. Additional financial support for tenant-based voucher family	\$	12ap.	
12aq. Financial incentive for property owner	\$	12aq.	

12ap & 12aq. Collect information for agencies using landlord incentives. Some MTW PHAs may provide financial incentives, in addition to HAP, to a property owner with a Housing Choice Voucher tenant.



Section 12: Lines 12ap & 12aq

Prorated Rent Calculation

12ab. Normal total HAP: copy from 12s, but do not exceed 12p

12ac. Total number eligible

12ad. Total number in family

12ae. Proration percentage: 12ac ÷ 12ad

12af. Prorated total HAP: 12ab X 12ae

12ag. Mixed family total family contribution: 12p minus 12af

12ah. Utility allowance: copy from 12m

12ai. Mixed family tenant rent to owner: 12ag minus 12ah

If positive or 0, put tenant rent

If negative, credit tenant

12aj. Prorated HAP to owner: 12k minus 12ai. If 12ai is negative, put 12k

12ak. MTW specific alternate rent type: ☐ MTW alternative gross income ☐ MTW Stepped rent
☐ MTW alternative adjusted income ☐ Other MTW alternative

12am. Alternate prorated HAP to owner (if a selection is made in 12ak or for the Local, Non-Traditional Property-Based program)

12an. Alternate prorated tenant rent (if a selection is made in 12ak, including Local, Non-Traditional Property-Based program)

Additional Payments (not HAP)

12ap. Additional financial support for tenant-based voucher family

12aq. Financial incentive for property owner

12ap & 12aq. Collect information for agencies using landlord incentives. Some MTW PHAs may provide financial incentives, in addition to HAP, to a property owner with a Housing Choice Voucher tenant.



New

Questions?

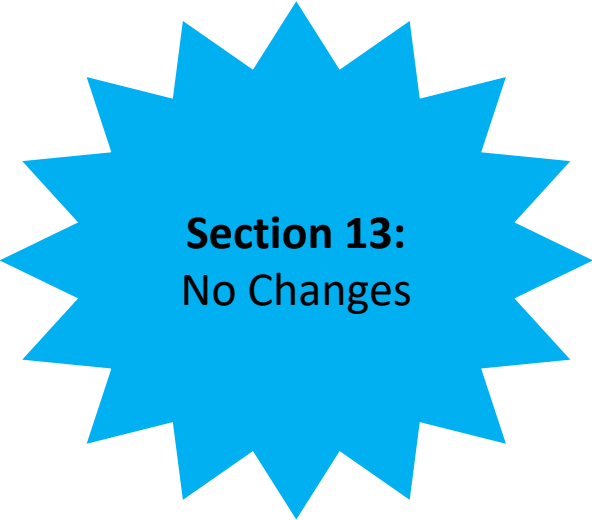
Section 10: Public Housing

Section 11: Project Based Vouchers and Local, Non-Traditional
Property Based

Section 12: Housing Choice Vouchers: Tenant Based Vouchers



Sections 13-16:



Section 13:
No Changes



Section 14:
No Section



Section 15:
No Changes



Section 16:
No Section

Section 17: MTW Self-Sufficiency

17. Family Self-Sufficiency (FSS)/MTW Self-Sufficiency

17a. Participate in special programs? (check all that apply)	<input type="checkbox"/> FSS	<input type="checkbox"/> MTW self-sufficiency
17b. FSS report category: (check no more than one)	<input type="checkbox"/> Enrollment	<input type="checkbox"/> Progress <input type="checkbox"/> Exit
17c. FSS effective date (mm/dd/yyyy) of action		
17d. PHA code of PHA administering FSS contract		
17e. MTW self-sufficiency report category: (check no more than one)	<input type="checkbox"/> Enrollment	<input type="checkbox"/> Progress <input type="checkbox"/> Exit
17f. MTW self-sufficiency effective date (mm/dd/yyyy) of action		
17g. PHA code of PHA administering MTW self-sufficiency contract		
17h. General information		
(1) Current employment status of head of household. Check the box to indicate the head of household's at the time addendum completed. <input type="checkbox"/> Full-time (32 hours per week or more) <input type="checkbox"/> Part-time <input type="checkbox"/> Not employed		
(2) Date (mm/dd/yyyy) current employment began		
(3) Benefits in current employment: (check all that apply) <input type="checkbox"/> Health <input type="checkbox"/> Retirement account <input type="checkbox"/> Other		
(4) Years of school completed by the head of household. Enter the highest grade of education or years of formal schooling the head of household completed at the time Addendum is submitted. (0-25)		
(5) Assistance received by the family: (check all that apply) <input type="checkbox"/> TANF Income Assistance <input type="checkbox"/> General Assistance <input type="checkbox"/> Food Stamps <input type="checkbox"/> Medicaid/Children's Health Insurance Program <input type="checkbox"/> Earned Income Tax Credit		
(6) Number of children receiving childcare services		
17i. FSS family services table (for MTW self-sufficiency go to 17r)		

“MTW Self-Sufficiency” replaces “Welfare to Work” in the label. References to Welfare to Work were changed to MTW self-sufficiency in four lines in this section: 17a, 17e, 17f, and 17g.



Section 17: Line 17i

17. Family Self-Sufficiency (FSS)/MTW Self-Sufficiency

17a. Participate in special programs? (check all that apply) ☐ FSS ☐ MTW self-sufficiency

17b. FSS report category: (check no more than one) ☐ Enrollment ☐ Progress ☐ Exit

17c. FSS effective date (mm/dd/yyyy) of action

17d. PHA code of PHA administering FSS contract

17e. MTW self-sufficiency report category: (check no more than one) ☐ Enrollment ☐ Progress ☐ Exit

17f. MTW self-sufficiency effective date (mm/dd/yyyy) of action

17g. PHA code of PHA administering MTW self-sufficiency contract

17h. General information

(1) Current employment status of head of household. Check the box to indicate the head of household's status at the time addendum completed.

☐ Full-time (32 hours per week or more) ☐ Part-time ☐ Not employed

(2) Date (mm/dd/yyyy) current employment began

(3) Benefits in current employment: (check all that apply) ☐ Health ☐ Retirement account ☐ Other

(4) Years of school completed by the head of household. Enter the highest grade of education or years of formal schooling the head of household completed at the time Addendum is submitted. (0-25)

(5) Assistance received by the family: (check all that apply)

☐ TANF Income Assistance ☐ General Assistance ☐ Food Stamps

☐ Medicaid/Children's Health Insurance Program ☐ Earned Income Tax Credit

(6) Number of children receiving childcare services

17i. FSS family services table (for MTW self-sufficiency go to 17r)

Line 17i updated to reflect that it will only be used for FSS reporting, so now there are parallel sections for reporting on FSS and MTW self-sufficiency.



Section 17 – Lines 17n, 17p & 17q

MTW Self-Sufficiency Program

17n. MTW self-sufficiency Contract Information

- (1) Initial start date (mm/yyyy) of contract of participation (Enrollment report only)
- (2) Initial end date (mm/yyyy) of contract of participation (Enrollment report only)
- (3) Contract date extended to (mm/yyyy) (if applicable)
- (4) Number of family members with Individual Training and Services Plan
- (5) Did the family receive selection preference because of a related service program participation? (Enrollment report only) (Y or N)

17p. MTW self-sufficiency Escrow account information

- (1) Current account monthly credit
- (2) Current account balance
- (3) Account amount disbursed to the family (cumulative as of end of reporting period)

17q. MTW self-sufficiency exit information (MTW self-sufficiency Exit Report only)

- (1) Did family complete contract of participation? (Y or N)
- (2) If (1) is Yes, did family move to homeownership? (Y or N)
- (3) If (1) is No, primary reason for exit:
☐ Left voluntarily ☐ Portability move-out ☐ Contract expired but family did not fulfill obligation
☐ Asked to leave program ☐ Left because essential service was unavailable

17r. MTW self-sufficiency family services table (for FSS go to 17i)

17n & 17q.
Welfare to Work
program
information
removed.

New

17n, 17p, 17q, and 17r. Added to capture information about households participating in MTW Self-Sufficiency Program, including contract Information, escrow account information, exit information, and family services.

Section 17 – Line 17r

New

17r. MTW self-sufficiency family services table (for FSS go to 17i)

	(1) Need (Y or N)	(2) Need Met Through Participation in Program (Y or N)	(3) Service Provider
Education/Training			
GED			
High school			
Post secondary			
Vocational/Job training			
Job search/job placement			
Job retention			
Transportation			
Health services			
Alcohol and other drug abuse prevention services			
Mentoring			
Homeownership counseling			
Individual Development Account (IDA)			
Child care			
None			
17r (3) Service provider codes: P = PHA D = DOL grantee PR = For profit entity E = Employer T = TANF agency V = Voluntary organization N = Nonprofit agency C = Community college			



Questions?



HUD-50058 MTW Expansion System Info

- For agencies with approved MTW Supplements
 - HUD will contact you to obtain information about who your software vendor is for 50058 submissions.
- For errors regarding data not conforming IMS/PIC form:
 - Modify form to be accepted in IMS/PIC **OR**
 - Retain records for later submission
 - Use HUD-50508 MTW Expansion Form once migrated to new system
 - Submit oldest effective date first, then chronologically to most recent action
- Migration to HIP will be slow (1-2 PHAs at a time)
- HUD to contact PHAs as agency migration approaches.



Resources

- [MTW Operations Notice](#)
- [Resource - HUD-50058: What's Different for MTW Expansion Agencies](#)
- [MTW and Special Purpose Vouchers FAQs](#)



Upcoming Landlord Incentives Cohort Onboarding Webinar

Office Hours	June 8, 2022	2:00 – 4:00 PM EDT
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Thank you!

